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Action learning: ripples within and beyond the set

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Action learning: ripples within and beyond the set

Abstract

Purpose – To explore the impact of action learning on an individual and an organisation, particularly the process by which each affected the other. The organisation is a UK National Health Service (NHS) Trust that includes two hospitals.

Design/methodology/approach – This is a single person case study involving a clinician, but we also hear the voice of an author. It involves the experience of the individual as they experience action learning as part of a leadership development programme leading to a Post Graduate Certificate. We explain our caution of the case study approach and in doing so offer our thoughts in how this paper could be read and impact on practice.

Findings – We show a process whereby an action learning set participant moves from being confident about their project to one of uncertainty as the impact of the project ripples throughout the organisation. Through this process of unsettlement, the individual's unnoticed assumptions are explored in ways that enable practical action to be taken. In doing so the individual's leadership and identity developed.

Originality/value – This single case study contributes to the debate on critical action learning (CAL) and the use of action learning in the NHS.

Key words: Critical action learning, action learning, leadership, assumptions, organisational impact, NHS, case study, confidence, unsettlement, clarity, power

Paper type - case study

Introduction

Action Learning (AL) has over time been used as a learning and development approach within the UK's National Health Service (NHS). A clinical leaders programme is the focus for this study. The programme comprised of 'taught' sessions as well as AL sets that led, for many, to a Post Graduate Certificate, Diploma or Masters qualifications. Reg Revans himself, the acknowledged pioneer of action learning, spent much of his career applying his methods to projects for the NHS and in Europe having previously developed his methods at the National Coal Board in the UK. As many who facilitate or experience action learning know, its founding *modus operandi* is to help managers ask insightful questions about complex problems. His original principles were sceptical of expert knowledge and even against too much facilitation of action learning sets; the emphasis should be on supporting participants (managers) in independently problem solving which he defines in four dimensions. These are familiar problem in familiar setting, familiar problem in unfamiliar setting, unfamiliar problem in familiar setting and unfamiliar problem in unfamiliar setting. An important feature is the building of teams around problem solving often across professional roles and functions within an organisation (Revans, 1998). Revans' enthusiasts have adapted, modified and developed the setting for action learning. Action learning is often now linked to what Revans would regard as programmed knowledge (Revans, 1998), for example DBAs and MBAs delivered by universities particularly linked to action research projects (Bourner et al., 2000).

In 1995 Revans supported the establishment of the Revans Centre for Action Learning and Research at the University of Salford that offered a PhD, Masters and post-graduate diploma in action learning

research but remained true to original principles by letting the programme of learning develop from problems being presented for resolution by the practitioner participants (Botham and Vick, 2008).

A more recent development is the practice of critical action learning (CAL) (Vince, 2004, 2008) that attempts to address the tension between inaction that can arise from a cocktail of power and politics with the expedience of conscious or unconscious risk-averse behaviour. The approach of CAL brings these dynamics to the fore and enables participants to notice and destabilise these relating tendencies. Therefore, CAL pays attention to reflexive processes of unsettlement as participants become aware of and react to power relations; and in doing so comes to affect wider patterns of organisational relating. To us CAL is a change of emphasis in action learning rather than anything 'new'.

Research question

Taking the developments above into account it therefore seems to be helpful to iterate here what it is that the deployment of action learning techniques seek to achieve in a leadership programme before discussing the case study. Overall in Revans' (Revans, 1998) terms learning (L) arises out of programmed learning (P) plus questioning insight (Q).

The questions addressed in this paper are:

1. To what extent the case presented here is evidence of an individual engaging in inquiry around an unresolved problem, learning through exploration of possible solutions through taking action and reflection and gaining insights? (Coghlan and Brannick, 2014).
2. How does action learning help leaders develop and practise leadership in the particular context and setting in which they work? (Dinkin and Frederick, 2013).
3. Finally, is the individual able to confidently take appropriate risks through action that provide experiences for further reflection and action that challenge established practice and power relations?

A note about language: given the fact that this case study is about our experience of action learning we have written much of this paper in the first person. We do this so as to communicate the sense of intensity that was evident in the experience. However, one person's experience features more than others, where this is the case we have moved from the 'we/us' to the 'I/me'.

A note on confidentiality: to protect confidentiality names and identifying details have been removed or altered.

Approach taken

The approach taken is that of a case study; long held as a means to explore complex events in organisations and to draw some helpful conclusions (Eisenhardt, 1989; Hartley, 2004; Yin, 1981). Czarniawska (1997, p64) cites Yin's definition of a case study as being an empirical inquiry that: investigates contemporary phenomena in real-life context; where there are boundaries between the phenomena and context; and uses multiple sources of information (Yin, 2011). However, the typical approach of a case study distances the reader from the temporal nature of the ongoing interactions that participants' need to make sense of and make decisions. It is this process of sense making, decision making, enactment and effect in the real world which leads to further conversation in the action learning set of what might happen next.

To address this problem, we have undertaken to write the case study and supporting material with a sense of 'provisionality', by which we mean an essence of the difficulties and challenges we all faced at the time and how we as a learning community took our next steps. We have therefore tried to avoid writing the case study along the lines of post-hoc certainty. Instead we hear the reflections

and sense making of one author, who we shall now refer to as 'T', in reflecting upon their experience with one participant. In this spirit we extend out to you as the reader and ask that you relate the events here with your own experience.

Our learning community as authors

Our case study shines a light on Christine told through the reflections of the learning set facilitator referred to as T. However, just as action learning does not sit in isolation from the social processes of an organisation neither does the work done by T to understand and reflect upon their work as a facilitator and author. Each of us facilitated an action learning set on the programme which consisted of three cohorts. As well as facilitating the action learning we were also present for the knowledge exchange sessions and the breakfast meetings with senior management.

We are academics that come from different backgrounds that include nursing, general management, microbiology and human resources amongst other practitioner roles. As part of our methodology we regularly met for reflexive conversations about our thoughts and practice. Indeed, this paper is part of a wider action learning research programme the results of which are in press.

The single person case study

A single person study is common in counselling, psychology and education, but less so in business studies. It is generally used in two forms. One in which the relationships between a set of conditions and an individual are explored (Morgan and Morgan, 2009) where the aim is to gain specific and detailed information about one person's experience (Doughty Horn et al., 2016) and to help others gain insight (Patton, 1990). A second that which (Ray, 2015) describes as a single case research design, being underpinned by experimental control. There is a desire to be able to replicate the study and account for a single variable: that of the intervention. This has become increasingly common as measurable outcomes of interventions are required by fund holders. What we are seeking is not empirical generalisations (Watson, 2009) but further understanding of how individuals - Christine and ourselves make sense (Weick, 1995) of the experiences that unfold through the action learning set. We are aware of the debates surrounding action learning and the individual versus organisational benefits. Brook et al (2013, p274) write that 'a considerable amount of action learning in the public sector seems to retain a strongly individualistic focus'.

Context and events

The trust

The NHS Trust comprises of general hospitals and other services. Like much of the NHS estate the hospitals consist of a variety of buildings of different styles and ages, with long confusing corridors between buildings and departments.

The programme

The programme is a Post Graduate Certificate in Clinical Management with the aim to create a cohesive body of leaders, equipped with the skills and knowledge to lead the Trust.

The day would start with a breakfast session. Typically, the Chief Executive Officer (CEO) and other senior directors were there milling about talking with delegates. More often than not the session would start a few minutes late with conversations continuing as they entered the meeting room with tables arranged in a straight edged 'horseshoe'. With no presentation prepared, but with thought given to the conversation, the Chief Executive would talk about recent developments and happenings in the Trust. Typically, they would be knotty problems, by which we mean issues without easy resolution. There was conversation, even gossip, about individuals and longstanding personal relationships mostly couched in overly professional measured tones which seemed to have less

measured undertones. With attention drawn to the Chief Executive, this was a process of communal sensemaking (Colville et al., 2013; Weick, 2012), the frankness of which occasionally surprised us, particularly when it came to sharing feelings of uncertainty and a willingness to seek the opinions of others in the group; the themes of which would often bubble up during the course of the day.

After the breakfast conversation with the CEO the group would split into its three learning sets, each with us as a facilitator. Ground rules would be re-iterated and their airtime commenced. Action learning problems would be aired by set members, clarified with the set before the problem would be engaged with prior to actions being determined by the individual. It was a traditional approach to action learning along with accompanying check-in and check-out.

In the afternoon we would cover a management topic such as finance, continuous improvement, leadership, strategy in what was termed Knowledge Exchange. The session would be prepared so that it was grounded in the reality of the attendees often bringing people in from the Trust. Ideas would be introduced but with most of the time spent with delegates exploring what those ideas might mean for them and their practice.

There were two assessments leading to the necessary sixty credits at masters level for the Post Graduate Certificate: 1) a project that they had to choose and implement in their area; 2) a leadership essay that charted their personal development from where they had been to now, to where they would want to be. The action learning sets were used to enable delegates to explore topics, decide on action to take and reflect on that experience.

The case of Christine (not her real name)

This particular learning set, facilitated by T, comprised of four doctors, including surgeons and anaesthetists along with two general managers. We offer three vignettes moving through the action learning process which demonstrate: 1. an early sense of purpose and clarity; 2. getting to know each other's working practices (and challenging stereotypes); and, 3. the creation of ripples of how people related to each other throughout the organisation.

Vignette 1: An early sense of purpose and clarity

Christine was a consultant surgeon, an expert in a certain surgical technique. She was affable, outwardly confident and socially 'polished'. She came to T's learning set with her project, to introduce a certain surgical technique that was shown to lead to better and safer clinical outcomes and was less expensive. The project was framed in the context of the breakfast conversation taken by the HR director rather than the CEO where there had been a frank conversation about the culture of the organisation.

Christine explained the project with clear explanations of how various steps were to be introduced by when. As Christine set out the goals for her project confidently and with certainty her capacity to make sense of what was happening was strongly connected to her professional operating model (Abolafia, 2010). The target in sight was clear, however the complexity of the working relationships in the hospital departments at this point was unconsidered. As we make this interpretation as researchers and facilitators we are cognisant of Watson (2009, p 432) who writes that 'When people offer us narratives of self, they are simultaneously talking "inwardly" as well as "outwardly"'. Here Christine is externally presenting as a confident professional leader in control whilst she has also made internal decisions as to 'the person or leader I want to be like'.

The set was still finding its feet with the action learning process. Having just affirmed our ground rules, questions were being asked and answered in a functional way where we were paying attention to the process rather the flow of the conversation and its content. That would come at

later meetings. The actions included: getting length of stay in hospital data; working with a manager to write a business case; and obtaining specialist equipment. The actions were straightforward in the sense of getting information and not addressing conflicting issues about how teams or departments were to work together for example.

There was very little by way of challenge or curiosity, a process marked with overt politeness, and reference (even reverence) to T when it came 'are we doing it right'. The exception was an anaesthetist who was more critical, but stayed largely quiet. I (T) sensed this disquiet and found it off-putting but not unusual.

Vignette 2: Getting to know each other's working practices (and challenging stereotypes).

At one learning set there was a conversation between Christine and the anaesthetist about medical secretaries, a conversation that became quite animated. The crux was this: the anaesthetist had been perplexed as to why some surgeons need a lot of secretarial support. The answer from Christine was that she had to write to GPs, the patients and other healthcare professionals often spanning months or years; something not required as much for an anaesthetist. The conversation went on to explore the various technological options for dictation but the nub of the issue came down to resource allocation and the importance of a close working relationship between the secretary and the surgeon. What I (T) became interested in was the exploration of their different worlds, brought to life emotionally through a discussion of resource (Ram and Trehan, 2010), an interest that I shared with the set. This sparked off more conversation, but to a greater depth along the lines of: to the surgeon, medical secretaries were an important part of the team, to the anaesthetist, an expensive resource for which technology might be an answer. But in this conversation that included the senior manager's perspective of how this resource was organised there developed a different understanding between the parties that would otherwise have gone unexplored.

Vignette 3: The creation of ripples of how people related to each other throughout the organisation.

In contrast to the first meeting Christine's project was now being implemented and had come up against resistance. People were questioning the viability and the safety of the project and she was concerned she was being set up to fail. She reported that a mood or tone of negativity was bubbling up in meetings and general conversations but, very little in ways of direct challenge. Others identified with this. Her polish and confidence slipped.

What I (T) found striking were the organisational ripples that were starting to occur for a project that began several months ago. Christine's demeanour was both puzzled and frustrated at the barriers of what to her was a project with very few drawbacks. In the learning set different points of view were expressed including nursing perspectives, resources in terms of hearing how people worked as well as how this might link with emergency care. Also we talked about who Christine might want to talk with and what were the politics of different relationships. Christine's mood at the end was very different with a number of actions and names jotted on her iPad.

With the support of the other learning set members Christine identified a number of actions to be taken that included identifying where negativity was coming from, what actions might constitute confidence building steps even in the form of a pilot and getting more data about safety and efficacy. From our analysis, Christine's professional mode of operating was being shaken and her identity as a successful leader who was in control was now provisional. By offering different perspectives and challenging questions the set members were revealing assumptions to Christine, many of which required different actions to be taken than would otherwise be the case (Reynolds, 1998). The set offered Christine the option of processing her thoughts and emotions around the project differently. For Christine this process was creating the opportunity for a provisional change in

her leader identity and the use of power. How Christine responded and made sense of her unsettling, as well as the recreation of her leader identity in the set and within the organisation, was a critical point for the set and T as facilitator.

By the end of the 10th learning set the trial project had been piloted and had been seen as a success and full roll out of the new procedure was planned. Subsequently this was carried out and it was seen as an important step forward.

Discussion and implication for practice

Useful humility when it comes to the claims we make

The paper so far offers a case study involving one person, one learning set and a facilitator (T). As we have already discussed, we do not offer generalizable insights in a linear or rationalistic sense. Indeed, in our commentary of case study methodology we are sceptical of such claims, particularly if they imply the observer, be it the researcher or indeed the reader, has some explicit or implied detached privileged position. Instead in the paper we are keen that you as the reader are involved in the bridge building work to relate our action learning insights to yours. In this sense we are drawing less on an episteme nature of knowledge, whereby insights are true irrespective of context, towards one sympathetic with the Aristotelian notions of *phronesis*, or practical wisdom (Baumard, 1999). In doing so we draw attention to lived experience as a temporal process with all its hesitation, knowing and not knowing and sensing. The questions that this raises for you the reader are reflexive (Cunliffe, 2009; [REDACTED]) in nature: do you relate to the case, and if so how? How might it come to affect your practice and understanding? If we were to have a conversation what would you say to us as authors to move our action learning practice? In other words, how can this paper prompt our development in the spirit and curiosity of action learning?

An early sense of purpose and clarity.

To recap, some people seemed accepting that they were part of a process and went with it, trying to work out what to do next. It was stilted whereby the gaze would revert to T to move ahead in the style of 'is this right'. Conversations lacked of support and challenge and were unreflexive. Some participants were sceptical, although they kept their council.

In 1916 John Dewey, from the pragmatist tradition of philosophy, discussed the issue of method and content. Dewey makes a point relevant here: 'Experience, in short, is not a combination of mind and world, subject and object, method and subject matter, but a single continuous interaction of a great diversity of energies' (Dewey, 2007, p127). In citing examples from the act of eating to the playing of a piano he states that there is no distinction between subject matter and method in a well functioning activity. But as we have noted, the experience of the first meeting the interaction between action learning method and subject matter was not well functioning, that had to wait.

In terms of practice as a facilitator there are a number of implications. Having facilitated many action learning sets we recognise these characteristics are not uncommon, albeit each is unique. The sceptical participant, came to trust the process once he saw it working, at which point he shared his unsaid scepticism, but this was more to do with the other set members showing how it worked, it had little to do with T: it was a form of vicarious demonstration.

Getting to know each other's working practices (and challenging stereotypes).

To recap, a few months later we have a surprising conversation about letters and secretarial support. On the face of it mundane and not significant to the participant's task, but it became politely heated. At times support was outpaced with challenge. It was a surprise for me (T), but one that I became curious about, both in terms of what it was revealing about the working relationship but also in relation to the action learning process. This was a pivotal point, after which we related to

each other slightly differently; assumptions became the subject for exploration and the questions were less often routed via T as the 'expert' in action learning.

Edgar Schein, the US academic interested in group processes and culture, invites us to think about culture in the form of three layers. Firstly there are the artefacts (eg visible organisational structures and processes); secondly the espoused beliefs and values (eg strategic goals, justifications, philosophies) and finally underlying assumptions (Schein, 2004, p25-37). These underlying assumptions comprise of unconscious taken for granted ways of working made more so by reinforcing attitudes and actions of those around the person, and as a result they are difficult to notice and talk about. It is this last layer, the one that is hardest to recognise and talk about, that is relevant to the experience here of noticing and talking about assumptions.

In terms of practice the facilitator could have suggested the conversation move onto something more 'substantial', perhaps relating to their projects. However, the facilitator let it flow and in doing so the participants energetically challenged each other. The screw continued to turn and the set became enlivened by this. At the end there was a change of understanding that was useful, both in the subject matter and how we got there. It is relevant to note that this related to the dynamics within the set only. The development of personal relationships and local knowledge built upon the first two categories of Rooke et al's taxonomy of action learning (Rooke et al., 2007).

This made me (T) reflect on how I was seen by the set, I was less of a facilitator, but more of a set member, whereby my influence was used to nudge, rather than direct. Increasingly my (T) presence related to silence and what I did not say rather than what I said.

The creation of ripples of how people related to each other throughout the organisation.

To recap, it was interesting to note that towards the end of the process Christine's confidence had taken a knock when her project was being taken up in the wider organisation: involving other professional groups and situations that required persuasion rather than direct control. The objections were unexpected and surprising, which affected her confidence and demeanour. In the learning set it was the other participants that spoke. My role as facilitator (T) was again to listen and give the occasional gentle steer, but there was a difference. Attention was focused on other participant's knowledge on the wider goings-on in the organisation, this was in contrast to earlier meetings where the gaze was on the goings on in the set. The learning set was creating ripples of impact, in this case that of Christine, and these were being responded to in the organisation causing reflection and further action amongst the set. The conclusion of the project was very much in doubt at this point and the conversation had both rational and logical elements but also important emotional themes too, what the Greeks might refer to as *logos* and *pathos*.

When it comes to practice it is relevant to notice the continual shifting nature of the set, both for the facilitator and the wider set. The organisational impact of projects was being noticed, reflected upon and further actions considered. The facilitator's (T) role now shifted to the occasional invitation to pause, reflect and consider. T was now largely redundant.

Holistic sense of the process

The events of the set were not just created within the set; they were affected by other dynamics too, an amplification of which was the regular breakfast meetings with the CEO or his directors. This related both the actual conversation with all the participants in the room but also the informal conversations beforehand. It was notable how this came to affect the learning set, particularly when there was a sharing of knotty and difficult issues that defied straightforward resolution. We saw with Christine how some of these comments provided a springboard for reflection and conversation

in the set. The question for practice is how can we enable these reflexive prompts to focus the conversation on issues that both the organisation and the individual cares about.

Looking to contemporary fiction to enable some reflexive prompts is not unusual when it comes to shining a light on practice (Knights and Willmott, 1999; Rhodes and Brown, 2005; [REDACTED]). At the time of writing this paper the thriller writer Robert Harris published his latest novel, a story of the fictitious events of the election of a new Pope and one individual's personal doubt, a doubt that was paradoxically reassuring at the point of greatest need. Off the cuff to the assembled cardinals and laity we hear the otherwise troubled Lomeli explain:

... Certainty is the deadly enemy of tolerance. ... Our faith is a living thing precisely *because* it walks hand in hand in with doubt. If there was only certainty, and if there were no doubt, there would be no mystery, and therefore no faith (Harris, 2016, p91).

We are not making any religious points here, instead we are illustrating how the acts and processes that keep a group together and to work productively on problems are the very same processes that might bring about its collapse. There is therefore an enabling interaction between group destruction and cohesion, something that we see most vividly in the account of the medical secretaries and the implementation of Christine's project; the former focused within the set, the latter affected by the organisation. And as stated previously, these factors were a mix of both the logical and rational as well as the more emotional.

Coming back to critical action learning (CAL) (Vince, 2004, 2008), where there is an emphasis on organisational impact, we can see in this case study the flux between the events outside of the set and the wider organisation. This occurred between meetings, but was made more intense with the breakfast conversations with the CEO and his team. Issues of uncertainty and the friction inside and outside of the set were both uncomfortable, but never the less vital (both in the sense of importance and giving life to) for the process.

In terms of practice the paying attention to the enlivening dynamic of stability/instability of the group is important. As is the acceptance, that sometimes it will not work out. It might have been easy to suppress moments of emerging conflict at the early stages, but this would have been counterproductive in this instance.

Conclusions

In this case study we pay attention to one individual in an action learning set. In three vignettes at the start, middle and end of a leadership programme sponsored by an NHS Trust we explore issues of certainty, doubt and progress that they experienced. We add to the debate as to how action learning can come to affect wider patterns within an organisation and how this might be intensified, and in doing so we contribute to recent discussions on critical action learning. We noted that certainty and confidence at the start became dented as the impact of their project came to have ripples throughout the organisation. However, through this the individual became aware of their barriers and own assumptions, which were noticed and challenged by the set, enabling useful progress to be made. This unsettlement of assumptions not only related external events, but also within the set. Earlier in the action learning process a trivial matter became heated. This enabled an exploration of each other's long held assumptions and views of each other. It was the facilitator's view that this was a pivotal moment in the set, yet one that could easily have been skirted over. We also draw attention to the intensification of organisational problems with the inclusion of breakfast meetings with the CEO and their team. Problems were aired and discussed in a way that infused and amplified the conversations of the set.

What is offered to you the reader are vignettes of practice and the offer of reflexive questions that might include: do you relate to the case, if so how? How might it come to affect your practice? And

what would you say to us about our practice? In other words, how might this paper prompt the development *our* action learning practice in the spirit and curiosity of action learning.

Limitations

This is a single person case study in one organisation thus affecting wider generalisation.

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Paper type - case study

Introduction

Action Learning (AL) has over time been used as a learning and development approach within the UK's National Health Service (NHS). Willcocks and Wibberley (2015) point to the increasing importance of inter disciplinary collaboration in healthcare so as to meet the increasing demands in health and suggest that action learning has an important part to play in enabling this. However in a recent report West and others (West et al., 2015) point to a lack of evidence that action learning has and what exists is often retrospective and self-reported. Vince (2012) highlights the issue of power relations, particularly amongst differing groups, notably managers and doctors. In this study we draw on evidence of the impact of action learning in the process of learning. We also show how this learning has been enabled and constrained by the power relations the individual here is part of, both within and beyond the set.

A clinical leaders programme is the focus ~~for~~of this study. The programme comprised of 'taught' sessions as well as AL sets that led, for many, to a Post Graduate Certificate, Diploma or Masters qualifications. Reg Revans himself, the acknowledged pioneer of action learning, spent much of his career applying his methods to projects for the NHS ~~and in Europe~~ having previously developed his methods at the National Coal Board in the UK. As many who facilitate or experience action learning know, its founding *modus operandi* is to help managers ask insightful questions about complex problems. His original principles were sceptical of expert knowledge and even against too much facilitation of action learning sets; the emphasis should be on supporting participants (managers) in independently problem solving which he defines in four dimensions. These are: familiar problems in familiar settings, familiar problems in unfamiliar settings, unfamiliar problems in familiar settings

and unfamiliar problems in unfamiliar settings. An important feature is the building of teams around problem solving often across professional roles and functions within an organisation (Revans, 1998). Revans' enthusiasts have adapted, modified and developed the setting for action learning. Action learning is often now linked to what Revans would regard as programmed knowledge (Revans, 1998), for example DBAs and MBAs delivered by universities particularly linked to action research projects (Bourner et al., 2000).

In 1995 Revans supported the establishment of the Revans Centre for Action Learning and Research at the University of Salford that offered a PhD, Masters and post-graduate diploma in action learning research but remained true to original principles by letting the programme of learning develop from problems being presented for resolution by the practitioner participants (Botham and Vick, 2008).

A more recent development is the practice of critical action learning (CAL) (Vince, 2004, 2008) that attempts to address the tension between inaction that can arise from a cocktail of power and politics with the expedience of conscious or unconscious risk-averse behaviour. The approach of CAL brings these dynamics to the fore and enables participants to notice and destabilise these relating tendencies. Therefore, CAL pays attention to reflexive processes of unsettlement as participants become aware of and react to power relations; and in doing so comes to affect wider patterns of organisational relating. To us CAL is a change of emphasis in action learning rather than anything 'new'.

Research question

Taking the developments above into account it therefore seems to be helpful to iterate here what it is that the deployment of action learning techniques seek to achieve in a leadership programme before discussing the case study. Overall in Revans' (Revans, 1998) terms learning (L) arises out of programmed learning (P) plus questioning insight (Q).

The questions addressed in this paper are:

1. To what extent the case presented here is evidence of an individual engaging in inquiry around an unresolved problem, learning through exploration of possible solutions through taking action and reflection and gaining insights? (Coghlan and Brannick, 2014).
2. How does action learning help leaders develop and practise leadership in the particular context and setting in which they work? (Dinkin and Frederick, 2013).
3. Finally, is the individual able to confidently take appropriate risks through action that provide experiences for further reflection and action that challenge established practice and power relations?

A note about language: given the fact that this case study is about our experience of action learning we have written much of this paper in the first person. We do this so as to communicate the sense of intensity that was evident in the experience. However, one person's experience features more than others, where this is the case we have moved from the 'we/us' to the 'I/me'.

A note on confidentiality: to protect confidentiality names and identifying details have been removed or altered.

Approach taken

The approach taken is that of a case study (with caveats); long held as a means to explore complex events in organisations and to draw some helpful conclusions (Eisenhardt, 1989; Hartley, 2004; Yin, 1981). Czarniawska (1997, p64) cites Yin's definition of a case study as being an empirical inquiry that: investigates contemporary phenomena in real-life context; where there are boundaries

between the phenomena and context; and uses multiple sources of information (Yin, 2011). However, the typical approach of a case study distances the reader from the temporal nature of the ongoing interactions that participants' need to make sense of and make decisions. It is this process of sense making, decision making, enactment and effect in the real world which leads to further conversation in the action learning set of what might happen next.

To address this problem, we have undertaken to write the case study and supporting material with a sense of 'provisionality', by which we mean an essence of the difficulties and challenges we all faced at the time and how we as a learning community took our next steps. We have therefore tried to avoid writing the case study along the lines of post-hoc certainty. Instead we hear the reflections and sense making of one author, who we shall now refer to as 'T', in reflecting upon their experience of working with one participant.

~~In this spirit we extend out to you as the reader and ask that you relate the events here with your own experience.~~

Our learning community as authors

Our case study shines a light on Christine, a consultant surgeon and an expertise in a certain surgical technique. Drawing on notes written shortly after the action learning set meetings her story is told through the reflections of the learning set facilitator referred to as T. However, just as action learning does not sit in isolation from the social processes of an organisation neither does the work done by T to understand and reflect upon their work as a facilitator and author. We are academics that come from different backgrounds that include nursing, general management, microbiology and human resources amongst other practitioner roles. Each of us facilitated an action learning set on the programme which consisted of three cohorts. As part of our methodology we regularly met for reflexive conversations about our thoughts and practice in the face of what was happening. Checkland and Howell (1998), in a paper on the validity of action research, point to the importance of a 'declared epistemology' (p16) that binds social heuristic processes of the researchers to the validity of insights in an overt exploration of: 1) research findings, 2) methods; and, 3) the way that the endeavour was envisaged. It is in the process of entering 'the "social practice" of the real world situation' that we can pay attention to multiple possibilities with researcher and participant alike to prove useful knowledge of the journey and the outcome. This enables us to draw away from the linear track of events of a post-hoc singular outcome towards equipping us for the multiple possibilities that seem real in the moment of happening. In this spirit, and that of Judi Marshall in a chapter titled *The practice and politics of living enquiry* (Marshall, 2011) we extend out to you as the reader and ask that you relate and imagine the events here with your own experience.

~~As well as facilitating the action learning we were also present for the knowledge exchange sessions and the breakfast meetings with senior management.~~

~~We are academics that come from different backgrounds that include nursing, general management, microbiology and human resources amongst other practitioner roles. As part of our methodology we regularly met for reflexive conversations about our thoughts and practice. Indeed, this~~This ~~paper is part of a wider action learning research programme~~considering the effect and evaluation critical action learning and the impact on individuals, groups and the organisations ~~the results of which are in press.~~

The single person case study

A single person study is common in counselling, psychology and education, but less so in business studies. It is generally used in two forms. One in which the relationships between a set of conditions

and an individual are explored (Morgan and Morgan, 2009) where the aim is to gain specific and detailed information about one person's experience (Doughty Horn et al., 2016) and to help others gain insight (Patton, 1990). ~~A~~Secondly that which (Ray, 2015) describes as a single case research design, being underpinned by experimental control. There is a desire to be able to replicate the study and account for a single variable: that of the intervention. This has become increasingly common as measurable outcomes of interventions are required by fund holders. What we are seeking is not empirical generalisations (Watson, 2009) but further understanding of how individuals - Christine and ourselves make sense (Weick, 1995) of the experiences that unfold through the action learning set. We are aware of the debates surrounding action learning and the individual versus organisational benefits. Brook et al (2013, p274) write that 'a considerable amount of action learning in the public sector seems to retain a strongly individualistic focus'. We therefore offer these insights in the hope they might strike a chord with practitioners of action learning enabling further reflexive steps to be made.

Context and events

The trust

The NHS Trust comprises of general hospitals and other services. Like much of the NHS estate the hospitals consist of a variety of buildings of different styles and ages, with long confusing corridors and staircases between buildings and departments.

The programme

The programme is a Post Graduate Certificate in Clinical Management with the aim ~~to~~of creating a cohesive body of leaders, equipped with the skills and knowledge to lead the Trust.

~~The Each~~ day would start with a breakfast session. Typically, the Chief Executive Officer (CEO) and other senior directors were there milling about talking with delegates and us. More often than not the session would start a few minutes late with conversations continuing as they entered the meeting room with tables arranged in a straight edged 'horseshoe'. With no presentation prepared, but with thought given to the conversation, the Chief Executive would talk about recent developments and happenings in the Trust. Typically, they would be knotty problems, by which we mean issues without easy resolution. There was conversation, even gossip, about individuals and longstanding personal relationships mostly couched in overly professional measured tones which seemed to have less measured undertones. With attention drawn to the Chief Executive, this was a process of communal sensemaking (Colville et al., 2013; Weick, 2012), the frankness of which occasionally surprised us, particularly when it came to sharing feelings of uncertainty and a willingness to seek the opinions of others in the group; the themes of which would often bubble up during the course of the day. Being a part of this conversation enabled us to develop insights into their worlds, insights that would often come up later in action learning set conversations.

After the breakfast conversation with the CEO the group would split into its three learning sets, each with us as a facilitator. Ground rules would be re-iterated and their airtime commenced. Action learning problems would be aired by set members, clarified with the set before the problem would be engaged with prior to actions being determined by the individual. It was a traditional approach to action learning along with accompanying check-in and check-out.

In the afternoon we would cover a management topic such as finance, continuous improvement, leadership and strategy in what was termed Knowledge Exchange. The session would be prepared so that it was grounded in the reality of the attendees often bringing people in from the Trust. Ideas would be introduced but with most of the time spent with delegates exploring what those ideas might mean for them and their practice.

There were two assessments leading to the necessary sixty credits at masters level for the Post Graduate Certificate: 1) a project that they had to choose and implement in their area; 2) a leadership essay that charted their personal development from where they had been to now; to where they would want to be. The action learning sets were used to enable delegates to explore topics, decide on action to take and reflect on that experience.

The case of Christine (not her real name)

This particular learning set, facilitated by T, comprised of four doctors, including surgeons and anaesthetists along with two general managers. We offer three vignettes moving through the action learning process which demonstrate: 1. an early sense of purpose and clarity; 2. getting to know each other's working practices (and challenging stereotypes); and, 3. the creation of ripples of how people related to each other throughout the organisation.

Vignette 1: An early sense of purpose and clarity

Christine ~~was a consultant surgeon, an expert in a certain surgical technique.~~ She was affable, outwardly confident and socially 'polished'. She came to T's learning set with her project, to introduce a certain surgical technique that was shown to lead to better and safer clinical outcomes and was less expensive. The project was framed in the context of the breakfast conversation taken by the HR director rather than the CEO where there had been a frank conversation about the culture of the organisation.

Christine explained the project with clear explanations of how various steps were to be introduced and by when. As Christine set out the goals for her project confidently and with certainty her capacity to make sense of what was happening was strongly connected to her professional operating model (Abolafia, 2010). The target in sight was clear, however the complexity of the working relationships in the hospital departments at this point was unconsidered. As we make this interpretation as researchers and facilitators we are cognisant of Watson (2009, p 432) who writes that 'When people offer us narratives of self, they are simultaneously talking "inwardly" as well as "outwardly"'. Here Christine is externally presenting as a confident professional leader in control whilst she has also made internal decisions as to 'the person or leader I want to be like'.

The set was still finding its feet with the action learning process. Having just affirmed our ground rules, questions were being asked and answered in a functional way where we were paying attention to the process rather than the flow of the conversation and its content. That would come at later meetings. The actions included: getting length of stay in hospital data; working with a manager to write a business case; and obtaining specialist equipment. The actions were straightforward in the sense of getting information and not addressing conflicting issues about how teams or departments were to work together for example.

There was very little by way of challenge or curiosity, a process marked with overt politeness, and reference (even reverence) to T when it came to 'are we doing it right'. The exception was an anaesthetist who was more critical, but stayed largely quiet. I (T) sensed this disquiet and found it off-putting but not unusual.

Vignette 2: Getting to know each other's working practices (and challenging stereotypes).

At one learning set there was a conversation between Christine and the anaesthetist about medical secretaries, a conversation that became quite animated. The crux was this: the anaesthetist had been perplexed as to why some surgeons need a lot of secretarial support. The answer from Christine was that she had to write to GPs, the patients and other healthcare professionals often spanning months or years; something not required as much for an anaesthetist. The conversation

went on to explore the various technological options for dictation but the nub of the issue came down to resource allocation and the importance of a close working relationship between the secretary and the surgeon. What I (T) became interested in was the exploration of their different worlds, brought to life emotionally through a discussion of resources (Ram and Trehan, 2010), an interest that I shared with the set. This sparked off more conversation, but to a greater depth along the lines of: to the surgeon, medical secretaries were an important part of the team, to the anaesthetist, an expensive resource for which technology might be an answer. But in this conversation that included the senior manager's perspective of how this resource was organised there developed a different understanding between the parties that would otherwise have gone unexplored.

Vignette 3: The creation of ripples of how people related to each other throughout the organisation. In contrast to the first meeting Christine's project was now being implemented and had come up against resistance. People were questioning the viability and the safety of the project and she was concerned she was being set up to fail. She reported that a mood or tone of negativity was bubbling up in meetings and general conversations but, very little in ways of direct challenge. Others identified with this. Her polish and confidence slipped.

What I (T) found striking were the organisational ripples that were starting to occur for a project that began several months ago. Christine's demeanour was both puzzled and frustrated at the barriers of what to her was a project with very few drawbacks. In the learning set different points of view were expressed including nursing perspectives, resources in terms of hearing how people worked as well as how this might link with emergency care. Also we talked about who Christine might want to talk with and what were the politics of different relationships. Christine's mood at the end was very different with a number of actions and names jotted on her iPad.

With the support of the other learning set members Christine identified a number of actions to be taken that included identifying where negativity was coming from, what actions might constitute confidence building steps even in the form of a pilot and getting more data about safety and efficacy. From our analysis, Christine's professional mode of operating was being shaken and her identity as a successful leader who was in control was now provisional. By offering different perspectives and challenging questions the set members were revealing assumptions to Christine, many of which required different actions to be taken than would otherwise be the case (Reynolds, 1998). The set offered Christine the option of processing her thoughts and emotions around the project differently. For Christine this process was creating the opportunity for a provisional change in her leader identity and the use of power. How Christine responded and made sense of her unsettling, as well as the recreation of her leader identity in the set and within the organisation, was a critical point for the set and T as facilitator.

By the end of the 10th learning set the trial project had been piloted and had been seen as a success and full roll out of the new procedure was planned. Subsequently this was carried out and it was seen as an important step forward.

Discussion and implication for practice

Useful humility when it comes to the claims we make

The paper so far offers a case study involving one person, one learning set and a facilitator (T). As we have already discussed, we do not offer generalizable insights in a linear or rationalistic sense. Indeed, in our commentary of case study methodology we are sceptical of such claims, particularly if they imply the observer, be it the researcher or indeed the reader, has some explicit or implied detached privileged position. Instead in the paper we are keen that you as the reader are involved in the bridge building work to relate our action learning insights to yours. In this sense we are drawing

less on an episteme nature of knowledge, whereby insights are true irrespective of context, towards one sympathetic with the Aristotelian notions of *phronesis*, or practical wisdom (Baumard, 1999). In doing so we draw attention to lived experience as a temporal process with all its hesitation, knowing and not knowing and sensing. The questions that this raises for you the reader are reflexive () in nature: do you relate to the case, and if so how? How might it come to affect your practice and understanding? If we were to have a conversation what would you say to us as authors to move our action learning practice? In other words, how can this paper prompt our development in the spirit and curiosity of action learning?

An early sense of purpose and clarity.

To recap, some people seemed accepting that they were part of a process and went with it, trying to work out what to do next. It was stilted whereby the gaze would revert to T to move ahead in the style of 'is this right'. Conversations lacked of support and challenge and were unreflexive. Some participants were sceptical, although they kept their ~~council~~counsel.

In 1916 John Dewey, from the pragmatist tradition of philosophy, discussed the issue of method and content. Dewey makes a point relevant here: 'Experience, in short, is not a combination of mind and world, subject and object, method and subject matter, but a single continuous interaction of a great diversity of energies' (Dewey, 2007, p127). In citing examples from the act of eating to the playing of a piano he states that there is no distinction between subject matter and method in a ~~well functioning~~well-functioning activity. But as we have noted, the experience of the first meeting the interaction between action learning method and subject matter was not well functioning; that had to wait.

In terms of practice as a facilitator there are a number of implications. Having facilitated many action learning sets we recognise these characteristics are not uncommon, albeit each is unique. ~~The One~~ sceptical participant, came to trust the process once he saw it working, at which point he shared his unsaid ~~scepticism~~concerns, but this was more to do with the other set members showing how it worked, it had little to do with T (~~an author of this paper~~): it was a form of vicarious demonstration.

Getting to know each other's working practices (and challenging stereotypes).

To recap, a few months later we have a surprising conversation about letters and secretarial support. On the face of it mundane and not significant to the participant's task, but it became politely heated. At times support was outpaced with challenge. It was a surprise for me (T), but one that I became curious about, both in terms of what it was revealing about the working relationship but also in relation to the action learning process. This was a pivotal point, after which we related to each other slightly differently; assumptions became the subject for exploration and the questions were less often routed via T as the 'expert' in action learning.

Edgar Schein, the US academic interested in group processes and culture, invites us to think about culture in the form of three layers. Firstly there are the artefacts (eg visible organisational structures and processes); secondly the espoused beliefs and values (eg strategic goals, justifications, philosophies) and finally underlying assumptions (Schein, 2004, p25-37). These underlying assumptions comprise of unconscious taken for granted ways of working made more so by reinforcing attitudes and actions of those around the person, and as a result they are difficult to notice and talk about. It is this last layer, the one that is hardest to recognise and talk about, that is relevant to the experience here of noticing and talking about assumptions.

In terms of practice the facilitator could have suggested the conversation move onto something more 'substantial', perhaps relating to their projects. However, the facilitator let it flow and in doing so the participants energetically challenged each other. The screw continued to turn and the set

became enlivened by this. At the end there was a change of understanding that was useful, both in the subject matter and how we got there. It is relevant to note that this related to the dynamics within the set only. The development of personal relationships and local knowledge built upon the first two categories of Rooke et al's taxonomy of action learning (Rooke et al., 2007).

This made me (T) reflect on how I was seen by the set, I was less of a facilitator, but more of a set member, whereby my influence was used to nudge, rather than direct. Increasingly my (T) presence related to silence and what I did not say rather than what I said.

The creation of ripples of how people related to each other throughout the organisation.

To recap, it was interesting to note that towards the end of the process Christine's confidence had taken a knock when her project was being taken up in the wider organisation: involving other professional groups and situations that required persuasion rather than direct control. The objections were unexpected and surprising, which affected her confidence and demeanour. In the learning set it was the other participants that spoke. My role as facilitator (T) was again to listen and give the occasional gentle steer, but there was a difference. Attention was focused on other participant's knowledge on the wider goings-on in the organisation, this was in contrast to earlier meetings where the gaze was on the goings on in the set. The learning set was creating ripples of impact, in this case that of Christine, and these were being responded to in the organisation causing reflection and further action amongst the set. The conclusion of the project was very much in doubt at this point and the conversation had both rational and logical elements but also important emotional themes too, what the Greeks might refer to as *logos* and *pathos*.

When it comes to practice it is relevant to notice the continual shifting nature of the set, both for the facilitator and the wider set. The organisational impact of projects was being noticed, reflected upon and further actions considered. The facilitator's (T) role now shifted to the occasional invitation to pause, reflect and consider. T was now largely redundant.

Holistic sense of the process

The events of the set were not just created within the set; they were affected by other dynamics too, an amplification of which was the regular breakfast meetings with the CEO or his directors. This related both the actual conversation with all the participants in the room but also the informal conversations beforehand. It was notable how this came to affect the learning set, particularly when there was a sharing of knotty and difficult issues that defied straightforward resolution. We saw with Christine how some of these comments provided a springboard for reflection and conversation in the set. The question for practice is how can we enable these reflexive prompts to focus the conversation on issues that both the organisation and the individual cares about.

Looking to contemporary fiction to enable some reflexive prompts is not unusual when it comes to shining a light on practice (Knights and Willmott, 1999; Rhodes and Brown, 2005; [REDACTED]). At the time of writing this paper the thriller writer Robert Harris published his latest novel, a story of the fictitious events of the election of a new Pope and one individual's personal doubt, a doubt that was paradoxically reassuring at the point of greatest need. Off the cuff to the assembled cardinals and laity we hear the otherwise troubled Lomeli explain:

... Certainty is the deadly enemy of tolerance. ... Our faith is a living thing precisely *because* it walks hand in hand in hand with doubt. If there was only certainty, and if there were no doubt, there would be no mystery, and therefore no faith (Harris, 2016, p91).

We are not making any religious points here, instead we are illustrating how the acts and processes that keep a group together and to work productively on problems are the very same processes that might bring about its collapse. There is therefore an enabling interaction between group destruction and cohesion, something that we see most vividly in the account of the medical secretaries and the implementation of Christine's project; the former focused within the set, the latter affected by the

organisation. And as stated previously, these factors were a mix of both the logical and rational as well as the more emotional.

Coming back to critical action learning (CAL) (Vince, 2004, 2008), where there is an emphasis on organisational impact, we can see in this case study the flux between the events outside of the set and the wider organisation. This occurred between meetings, but was made more intense with the breakfast conversations with the CEO and his team. Issues of uncertainty and the friction inside and outside of the set were both uncomfortable, but never the less vital (both in the sense of importance and giving life to) for the process.

In terms of practice the paying attention to the enlivening dynamic of stability/instability of the group is important. As is the acceptance, that sometimes it will not work out. It might have been easy to suppress moments of emerging conflict at the early stages, but this would have been counterproductive in this instance.

Conclusions

In this case study we pay attention to one individual in an action learning set. In three vignettes at the start, middle and end of a leadership programme sponsored by an NHS Trust we explore issues of certainty, doubt and progress that they experienced. We add to the debate as to how action learning can come to affect wider patterns within an organisation and how this might be intensified, and in doing so we contribute to recent discussions on critical action learning. We noted that certainty and confidence at the start became dented as the impact of their project came to have ripples throughout the organisation. However, through this the individual became aware of their barriers and own assumptions, which were noticed and challenged by the set, enabling useful progress to be made. This unsettlement of assumptions not only related external events, but also within the set. Earlier in the action learning process a trivial matter became heated. This enabled an exploration of each other’s long held assumptions and views of each other. It was the facilitator’s view that this was a pivotal moment in the set, yet one that could easily have been skirted over. We also draw attention to the intensification of organisational problems with the inclusion of breakfast meetings with the CEO and their team. Problems were aired and discussed in a way that infused and amplified the conversations of the set.

What is offered to you the reader are vignettes of practice and the offer of reflexive questions that might include: do you relate to the case, if so how? How might it come to affect your practice? And what would you say to us about our practice? In other words, how might this paper prompt the development of our action learning practice in the spirit and curiosity of action learning.

Limitations

This is a single person case study in one organisation thus affecting wider generalisation.

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